



John Smith

Command Center Analyst

Reactive

Focused

Aware

★ Goal

Looking at alarms and trying to cascade to the field service team.

Receive Alarm

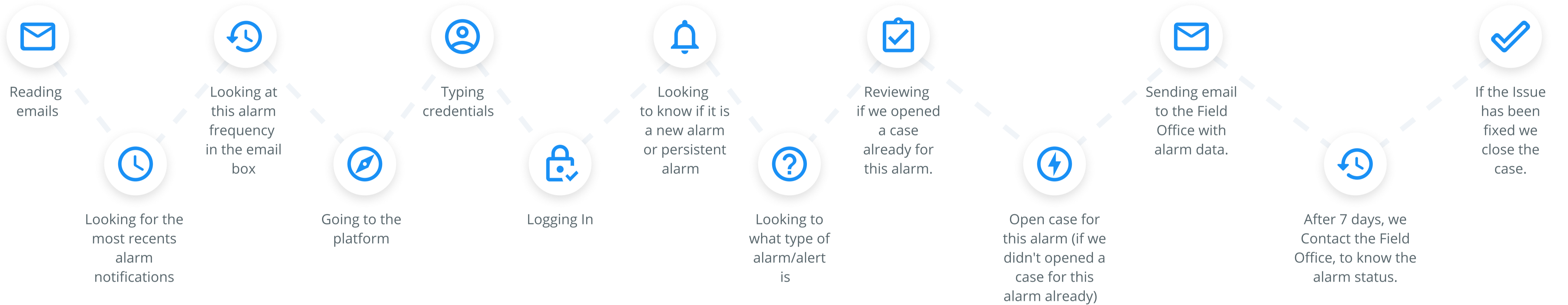
Sign in to Platform

Review the Alarm

Open Case

Case Follow-up

Task list



Questions

- What is the alarm code?
- What type of alarm is?
- What is the alarm description?
- What is the alarm frequency?

- What type of credentials should I provide?
- Personal or corporate?

- Is this a new alarm or a persistent alarm?
- Does this alarm has an open case?
- Do I need to open a case for this alarm

- What information should I provide to the Field Office?

- Has the problem been resolved?
- What is the timeframe estimation of the repair?

Emotions



Improvements Opportunities

- When alarm notification arrives into the email box, the user don't have all the knowledge he needs to go the next step of the Journey.
- The user have to dig deeper into the email box sorting and searching alarms to find more relevant data about this alarm, like frequency.
- Threshold alarms should not be ignored by the user, if is not important for him, it might be better to just not report those to his email inbox.
- Reduce the alarm noise, the same alarm is coming to the user inbox every 15min, and it will keep going till the issue is solved, in a process that can take weeks to months to be solved.

- Fast log in, user should spent the shortest time possible here

- Quick access to alarm history
- Better filter for alarms
- Fast access to open case
- The platform should have the ability to filter alarms in a History Page, to segregate the alarms with open cases, the ones that have not been acted on and the fixed alarms.

- Opening a case is being done in another platform, which may disconnect the user from Smart Service
- Give the ability to open case at SMART, at some level, maybe not too detail, 'cause there is another platform to manage that, but to at least acknowledge an alarm has been taking care of, and avoid the persistent notification.

- Better tagging system for alarms
- Features for alarm tracking



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★ Goal

Reporting to Costumers, the experience of creating, customizing and sending the Report.

Sign in to Platform

Reports Page

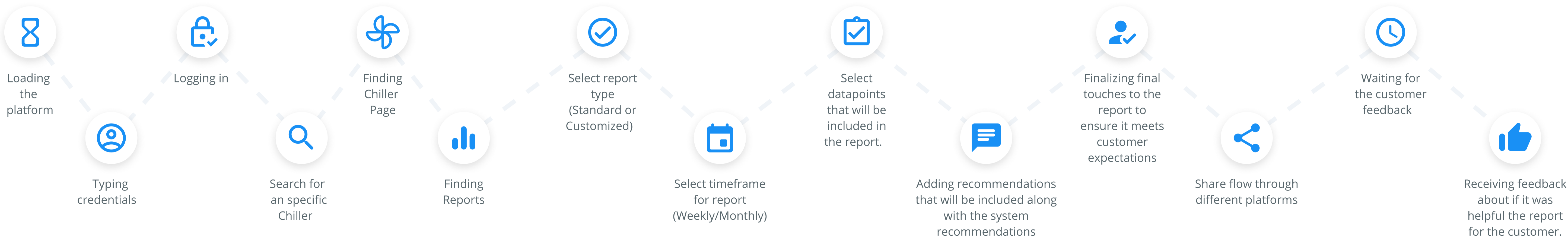
Create Report

Customize Reports

Share Report

Customer Feedback

Task list



Questions

- What type of credentials should I provide?
- Personal or corporate?

- Where can I find the reports page
- How can I get there faster?

- What type of report does my customer need?
- What timeframe does my customer needs?

- What datapoints are the most relevant for my customer?
- What should I tell my customer about his chiller, besides what the system is already saying?

- How can I give this report to the customer?
- What channel is the most appropriate for him.

- Was this helpful for the customer?
- How can I make it better?

Emotions



Improvements Opportunities

- Fast log in, user should spent the shortest time possible here

- Better navigation
- Fast access to reports

- Monthly reports have been indicated as useful, but users are concerned that daily reports do not have much to offer
- Adding weekly report
- Better reporting or automated system for reporting
- Better builder for reports
- Adding ability for standard and customized reports

- Easy to use Report Design, through the builder, where the user can design his own report with minimum effort

- Fast delivery to the customer, shorten download and upload times.

- Feature to gather fast feedback about the value of the report, could be a valoration or rating system.



Antoine Bernard

Service Engineer

Detective

Teacher

Reactive

★ Goal

Support technicians troubleshooting chillers

Alarm Notification

Sign In to Platform

Chiller page

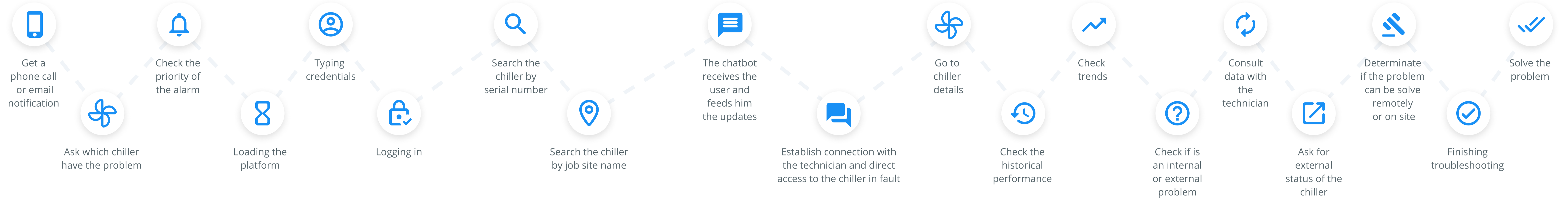
Open ChatBot

Check Performance

Diagnosing

Solutions

Task list



Questions

- How many alarms are existing now?
- What's the priority of the alarm?
- What's the information of the chiller?

- What credentials should he use, personal or business?
- How long will it take to the platform to load?
- How will I be able to help?

- What is the serial number of the chiller or does it have another form of identification?
- What is the job site name?
- What is the contract number?

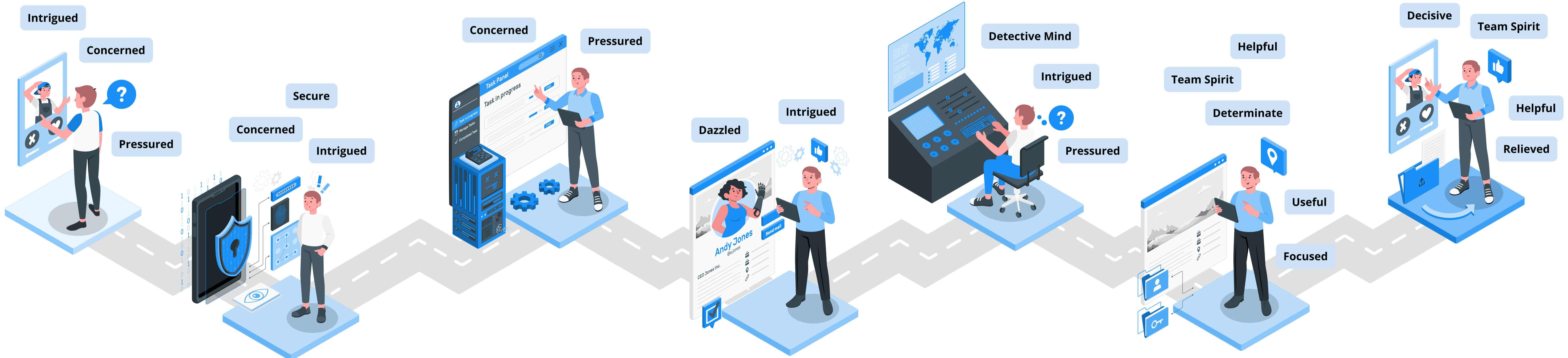
- How can a bot help me?
- Is this information helpful?

- What is the behavior for the past days or month?
- Is there any datapoint pointing to the roof?
- Is all within normal ranges?

- Is the problem source due to internal malfunction?
- Is the problem source due to an external factor of the chiller or the site?

- The problem can be solved from the system?
- The problem can be solved on site?
- What is the most viable solution?

Emotions



Improvements Opportunities

- The system should have a priority filter stage to show what are the most important open alarms
- The email notification should have a direct link to an specific chiller to shorten the response time

- The system should remember the user credentials
- Fast log in, user should spent the shortest time possible here

- The system should show the user the chiller with alarms reports
- As a user he would expect to get to the chiller ASAP

- The ChatBot that is going to be used for diagnostics and troubleshooting can also connect technicians with service engineers or Command Center. This way the process would occur within the platform and not outside of it, it is helpful to bring users to the platform and make them use it.

- The system should give a possible feedback about the existing problem
- Show the user what data they need to check
- The trends should be customized so the user can check the relation between specific data that might not been displayed in the original setting

- The platform could show possible questions or parameters to check if it the problem is outside of the platform
- The user needs the external conditions of the chiller
- The system should collect information about site status

- The system should indicate that the problem has been solved
- The system should save a report about the problem and the solution for future references



Liu Zhang

System Admin

Proactive

Responsible

Multitasking

★ Goal

Onboard Chillers (Connecting chillers to modems)

🔔 Onboarding Order

📄 Check Customer Data

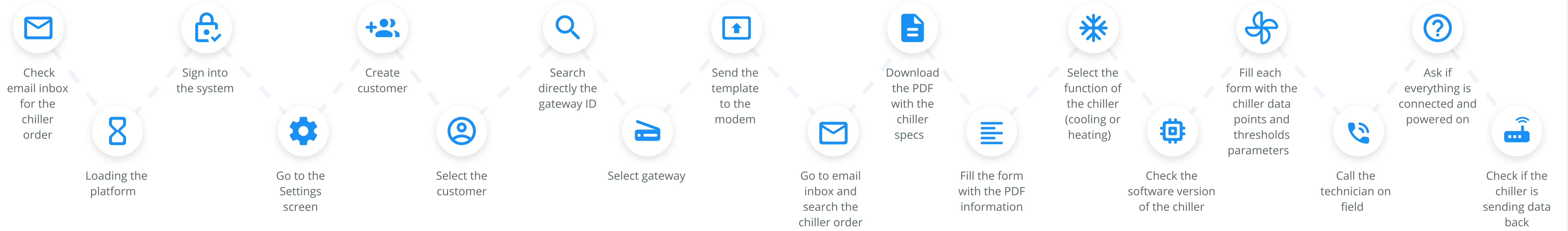
📄 Configuration of Chiller Gateway

⚙️ Configuration of Chiller Model

🌀 Configuration of Chiller Design Data

✅ Finish Onboarding

Task list



Questions

- How many orders are waiting to be set up?
- To what client does the order belongs?

- Is the client already on the data base?
- Do I need to create a new customer account in the system?

- To which Gateway the chiller will connect to?

- What is the model and serial number of the chiller?

- What is the chiller's function?
- What software version does it have?
- What are the data points and thresholds that will be measure on the system?

- Is the technician on site?
- Is the chiller installed and powered on?
- Is the chiller connected to the gateway?
- Is the chiller sending data?

Emotions



Improvements Opportunities

- The user has to check the email to see new orders, this information could come directly from the system itself
- The user has to download a PDF with the information that he needs for work, why can not the system already have that pre-populated

- The user has to manually search the customer's name in order to find out if there is necessary to create a new customer account

- The system can display the gateway availability for the incoming chillers

- Every datapoint that has to be put into the system is manually done by typing or copying & pasting from the PDF
- The user has to switch between platforms to get the datapoint into the forms

- Every datapoint that has to be put into the system is manually done by typing or copying & pasting from the PDF
- The user has to switch between platforms to get the data into the forms
- There are too many forms and do not have any distinction between each other, or a behavior that guides the user in the process

- The system should be more automated so there is less chance for human error



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Multitasking

★ Goal

Troubleshoot Connectivity with Technicians

Get a Call from the Technician

Sign In to the Platform

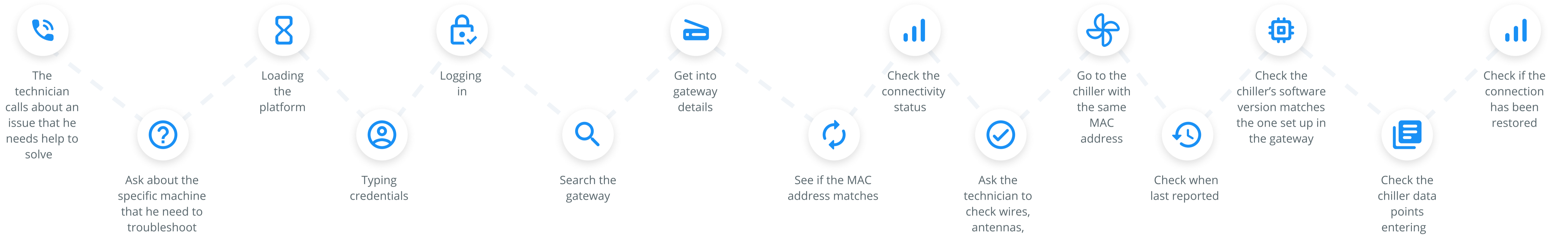
Go to Gateway

Check Gateway Information

Check the Chiller

Check Datapoints

Task list



Questions

- Which machine is presenting problems?
- What is the name of the modem?

- What credentials should I use, personal or business?
- How long will it take to the platform to load?
- How will I be able to help?

- What is the identification of this gateway on the system?

- How is the gateway connectivity status?
- How is the gateway hardware status?
- How has the gateway behaved in the last days or months?

- Which chiller is connected to this specific gateway
- Which software version is operating
- Does it matches the one set up on the gateway configurations?

- Is everything fine with the chiller?
- Is the connection restore?

Emotions



Improvements Opportunities

- Having to wait for the technician's call to find out that there is a problem

- The system should remember the user credentials, without security risk

- The system could show the user the gateways with alarms reports

- The physical status of the gateway should be somehow collected into the system

- The software version issues should be displayed
- The system could be more intuitive about the problems and possible solutions

- The system should indicate that the problem has been solved
- The system should save a report about the problem and the solution for future references



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System Admin

Proactive

Responsible

Multitasking

★ Goal

Onboarding and managing users, assign roles and permissions



Check User Approvals



Configure Account Information



Assign Roles and Permissions



Confirm Account Creation

Task list



Check if there are any user pending for approval



Check that the email account is valid



(If not) Call them and ask them to use a company email



Wait for right email account



Get into user account settings



Configure the account data



Assign roles



Assign permissions



Send confirmation email or notification with account information to the customer

Questions

- How many accounts are waiting for approval?
- How many emails are wrong?

- Is the overall data filled correctly?

- What is the role of this account?
- What are the permissions for this role?

- Is the setup for the account complete?

Emotions



Improvements Opportunities

- The system should indicate to the customer the acceptable email directions
- The user shouldn't have to check this data manually

- The system should have the option to fill the information with the data from the mail account used to register the account

- The roles could have some profile settings that suggest a default configuration
- The option for customized configuration should remain as a secondary option

- The system should send an internal message or notification that everything is correctly done